



Treatment Planning System Preparation

In preparation for configuring the Treatment Planning System, the following set up can be reviewed.

- 1) Must have development turn on the Face Sheet so it appears and can be added to User Group Menu.

User Group Access to Menu Options

Insights

Placements

Clients

Timeline		<input type="radio"/> Disabled	<input checked="" type="radio"/> Edit
Profile	Core x ▾	<input type="radio"/> Disabled <input type="radio"/> Read Only	<input checked="" type="radio"/> Edit
Contact Info		<input type="radio"/> Disabled <input type="radio"/> Read Only	<input checked="" type="radio"/> Edit
Documents		<input type="radio"/> Disabled <input type="radio"/> Read Only	<input checked="" type="radio"/> Edit
Episodes	Core x ▾	<input type="radio"/> Disabled <input type="radio"/> Read Only	<input checked="" type="radio"/> Edit
Enrollments	Core x ▾	<input type="radio"/> Disabled <input type="radio"/> Read Only	<input checked="" type="radio"/> Edit
Diagnosis		<input type="radio"/> Disabled <input type="radio"/> Read Only	<input checked="" type="radio"/> Edit
Schedule		<input type="radio"/> Disabled	<input checked="" type="radio"/> Edit
Face Sheet		<input type="radio"/> Disabled <input type="radio"/> Read Only	<input checked="" type="radio"/> Edit

- 2) List the treatment plans needed and their associated forms.
 - a. Separate treatment plans will be needed if they require different review periods, different forms/fields, different permissions for access.
 - b. A FDNext form will need to be created or moved to EchoVantage in order configure the fields to be used as a summary for each treatment plan type.
 - c. A FDNext form will need to be created or moved to EchoVantage in order configure the fields to be used as a summary for each problem on each treatment plan type.

Name *
Initial Treatment Plan

Start Date **End Date**

Review Period (Days)

Summary Form
Treatment Plan Summary x | v

Problem Form
Problem Summary x | v

- 3) List the assessments being used for treatment planning.
 - a. Make sure Form DesignEHR form is available for these and has “assessment” checked on the form so it appears in the Assessment configuration drop-down.
 - b. Consider whether you want to control which clients can receive each assessment. If so a view will need to be created for the Assessment Filter View.

Name *
PHQ-9 Depression Score

Start Date 09/01/2022 **End Date** Include as option in Clinical Hub

Description

Form
PHQ9 x | v

Data View *
VAssessment_PHQ9 x | v

Filter View
VAssessmentClients_HasEnrollment x | v

- 4) What types of services are they providing?
- Interventions** (e.g., individual therapy, group therapy) can be combined as long as they use the same credentials for billing, the same service components, and the same Progress Note form.
 - What progress note goes along with each service

Name *
Therapy - Individual and Family

Start Date
09/01/2022 **End Date**

Required Credentials *

Lic. Clinical Addiction Specia x Billable to BCBS x Lic Clinical Social Worker x Lic Mental Health Counselor x Registered Nurse x

Lic Marriage and Fam Therapist x Licensed Professional Counselor x Doctor of Osteopathic Medicine x Clinical Nurse Specialist x x v

Licensed Psychological Assoc. x Nurse Practitioner x Physician Assistant x Doctor of Medicine x Licensed Psychologist x

Progress Note Form *
SOAPPN4 x v

Valid Component Codes

Program	Location	Activity
OUTMH Outpatient Mental Health	CRISIS Crisis Center	IND Individual Therapy
Attendance	Recipient	
CAN Cancelled Appointment HERE Client has arrived KPT Kept Appointment NOS No Show PEND Pending	ADULT Adult Age >17 Years Old	

- 5) What types of treatment are they providing?
 - a. **Treatment Methods** (e.g., CBT) can be generic if no evidence-based practices are being used.

Name *
(CBT) Cognitive Behavioral Therapy

Start Date
09/01/2022 **End Date**

Required Credentials

Doctor of Osteopathic Medicine x
 Lic Clinical Social Worker x
 Licensed Professional Counselor x
 Lic Mental Health Counselor x
 Clinical Nurse Specialist x Billable to BCBS x
 Licensed Psychologist x Registered Nurse x
 Nurse Practitioner x Lic. Clinical Addiction Specia x
 Doctor of Medicine x
 Lic Marriage and Fam Therapist x
 Licensed Psychological Assoc. x Physician Assistant x

Use of Objectives *
Include all objectives on client treatment plans x | v

Objectives

Preparation

Assist client in identifying and processing troubling situations in their life v | edit | x

+ ADD OBJECTIVE

Contemplative

Assist client in admitting their may be some work that needs to be done on their thinking patterns. v | edit | x

+ ADD OBJECTIVE

- 6) What stages of change will they want to use?
 - a. **Stages of change** are used to categorize Objectives and Milestones. They can be generic (e.g., one stage of change called “Active”) if the agency doesn’t want to use this categorization.
- 7) List of objectives and milestones for each Stage of Change.

Additional Considerations

- Agencies might want to set up automated tasks. These currently must be configured through views.
- Agencies may want a SSRS report associated with each treatment plan type.